

HANDOUT: 3.2 — FACILITATION CHECKLIST

Here is a series of questions you should ask if you have been requested to facilitate a meeting. These questions can be used as a guide for clarifying the purpose and details for an upcoming meeting. You can also use this checklist whether you are the organizer of the meeting or if you are working with a facilitator to guide the meeting.

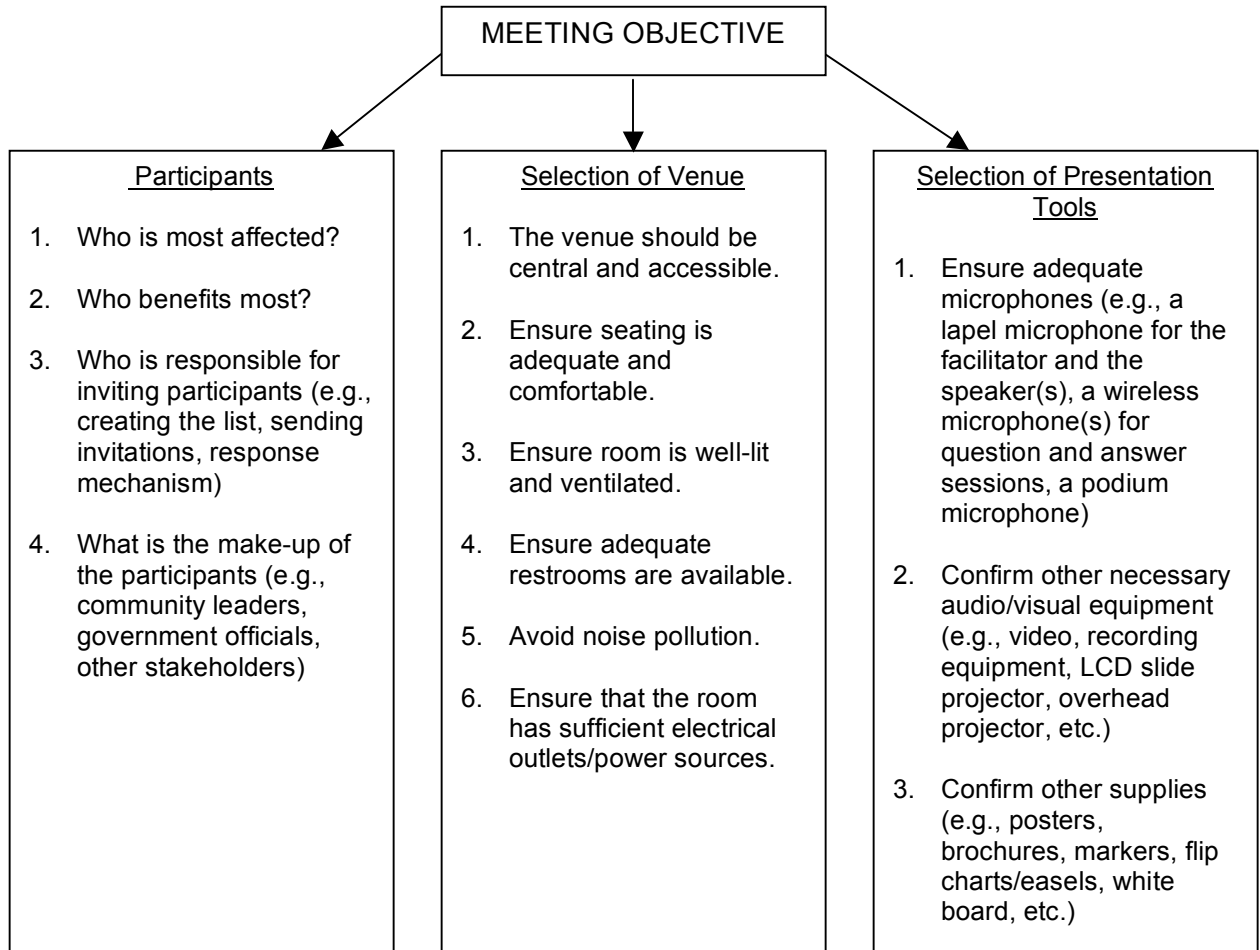
GENERAL QUESTIONS

1. Who is organizing the meeting? Is the same person who is organizing the meeting also chairing the meeting?
2. What is the purpose of the meeting?
3. What do the organizers want as a result or outcome of the meeting?
4. What is the history of the situation, or topic, for convening the meeting?
5. What is the expected size of the group that will participate or attend the meeting?
6. Who will be affected by decisions made by the people at the meeting?
7. Are there any underlying situations or problems that I, as facilitator, need to be aware of? (Will any of these issues be highly contentious or difficult for participants?)
8. What is the timeframe for preparing and conducting the meeting? (If there will be a series of meetings to address an issue, what is the timeframe for the entire process – from start to finish? And what are the desired intervals and dates of the meetings?)
9. Is there clarity about my responsibilities as facilitator, (e.g., process design, preparation of agenda, meeting facilitation, meeting summary, etc.)? What are the limitations or boundaries of my authority over the meeting?
10. Is there clarity about the responsibilities of other people involved with the meeting? Who will be responsible for meeting logistics, communication, background materials, and notes?
11. Will the participants be asked to evaluate the meeting, to assess its success in achieving stated outcome(s) or objective(s) of the meeting? Will the participants be asked to evaluate the facilitator's performance?
12. Ultimately, what criteria will determine if the meeting is successful in achieving the meeting's stated goals(s) and objective(s) or if the meeting is successful (in other ways)?
13. Is there any other important information I, as facilitator, should know about the meeting, the issues to be addressed, or the expected outcome(s) of the meeting?

LOGISTICS

As a facilitator, you need to know who is responsible for the meeting's logistical arrangement and confirm that all necessary arrangements have been made.

Here is a matrix of points to consider.



Sources:

Hinke, L. and Engleby, L. (instructors/editors). 2002. Navigating in Rough Seas: Public Policy Issues and Conflict Management. NOAA Coastal Services Center. 51 p.

Gardner, L. 2003. 51 p. UNEP-CEP: Training of Trainers in Marine Protected Areas Management. 1-11 p.